



Authorised FSP. NO: 53054

QUESTIONNAIRE FOR DRAFTING OF WILLS

1. TYPE OF WILL

1. Single will or Joint will
2. New will or Revision of an existing will

2. PERSONAL INFORMATION OF TESTATOR

(Testator: the person who is making the will)

Names : _____

Surname : _____

ID Number : _____

Contact Number : _____

Email Address : _____

Employer : _____

Position : _____

Physical Address: _____

NEXT OF KIN

Names : _____

Surname : _____

ID Number : _____

Contact Number: _____

Email Address : _____

Physical Address: _____

3. WIFE/HUSBAND/LIFE PARTNER'S DETAILS

Names : _____

Surname : _____

ID Number : _____

Contact Number : _____

Email Address : _____

Employer : _____

Position : _____

Physical Address: _____

4. MARITAL STATUS

- A. Married in Community of Property;
- B. Out of Community of Property;
- C. Divorced;
- D. Unmarried
- E. Widowed
- F. Partnership

5. APPOINTMENT OF EXECUTOR

(Executor: A person appointed by the testator to handle their affairs after death, e.g. spouse, major child, parent, sibling, attorney, etc)

Names : _____

Surname : _____

Contact Number : _____

Physical Address: _____

6. HEIRS

(children, siblings, parents, close relatives and/or any other person that you wish to inherit your assets upon death).

Full Names : _____

Surname : _____

ID Number/D.O.B: _____

Contact Number : _____

Full Names : _____

Surname : _____

ID Number/D.O.B: _____

Contact Number : _____

Full Names : _____

Surname : _____

ID Number/D.O.B: _____

Contact Number : _____

Full Names : _____

Surname : _____

ID Number/D.O.B: _____

Contact Number : _____

7. MINOR HEIRS

In the case of minor heirs, we strongly urge that the inheritance vests in a testamentary trust.

Must the inheritance be kept in a trust? Yes No

9.2 Policies payable to beneficiaries:

NAME OF COMPANY	POLICY NUMBER	DEATH VALUE

12. BEQUESTS
(Which asset must be inherited by whom)

DETAILS OF ASSET	FULL NAMES & SURNAME	RELATIONSHIP TO TESTATOR	ID NUMBER/D.O.B.

13. WISHES

Wishes to be included in will, e.g. place of burial, cremation, organ donation, etc. (This is optional).
